Provides ongoing, permanent support to one or more nonprofit organizations or qualified charitable programs. If nonprofit beneficiaries should cease to function, the Foundation will redirect income to best achieve the donor’s original charitable purpose.

MINIMUM CONTRIBUTION LEVEL

$10,000
Can be achieved over five years; annual spending amount is reinvested until minimum is achieved.

ACCEPTABLE GIFT TYPES

- CASH/CHECK
- CREDIT CARDS (via secure online contributions)
- PUBLICLY-TRADED AND CLOSELY HELD SECURITIES
- BEQUESTS liquid assets as well as tangible personal property and real estate
- RETIREMENT FUNDS
- TRUST BENEFICIARY
- LIFE INSURANCE

FOUNDATION OVERSIGHT FEES*

| First $1 Million | 1.00% OF FUND MARKET VALUE |
| Next $2 Million  | 0.80%                      |
| Balances Over $3 Million | 0.60%                     |
*Fees are pro-rated and charged monthly

INVESTMENT FEES

APPROXIMATE AVERAGE OF 0.45%;

ANNUAL SPENDING POLICY

PERMANENT FUNDS ONLY

TYPICALLY 4.0% OF BLENDED MARKET VALUE
based on five-year rolling average of fund’s market value

GRANTING POLICY

DESIGNATED ORGANIZATION NOTIFIED OF ANNUAL GRANT AMOUNT IN Q1; DISTRIBUTION IN Q2.